



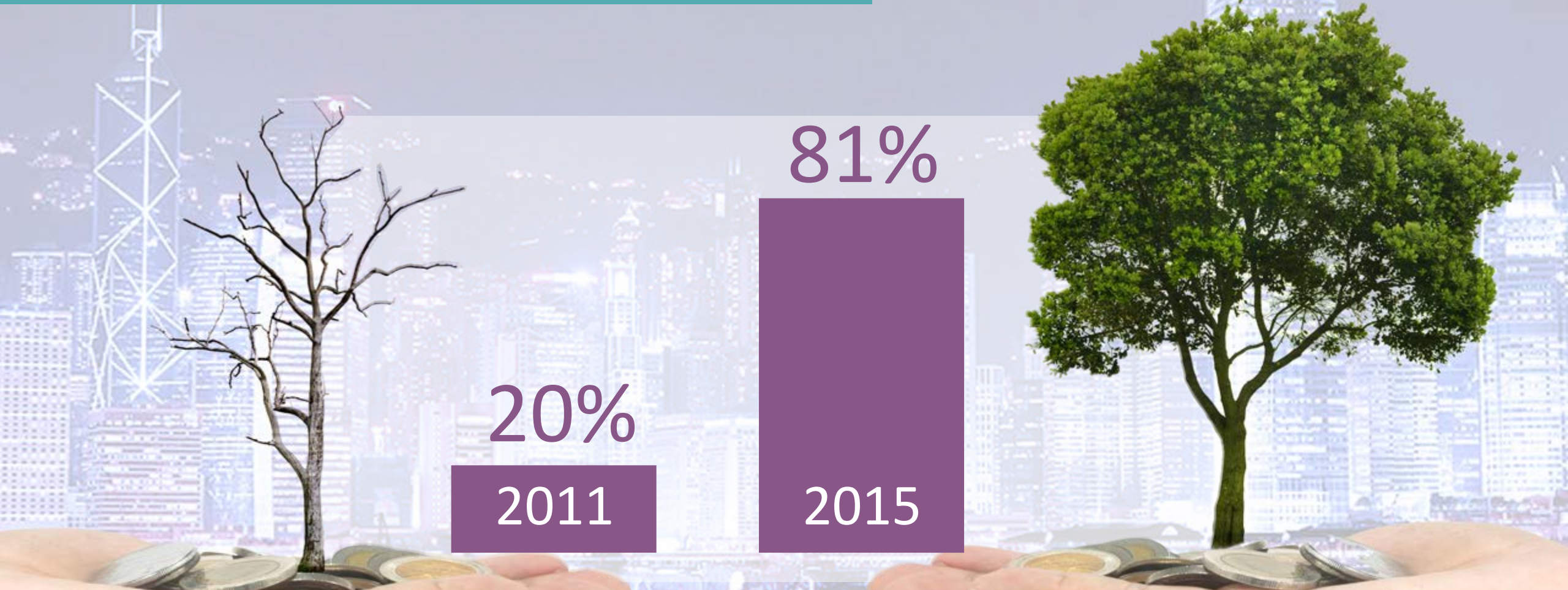
TAKING A STAND

Brands, Social Good & Consumer Expectations

YouGov[®]

CSR Initiatives Increasingly Incorporated into Business Strategy

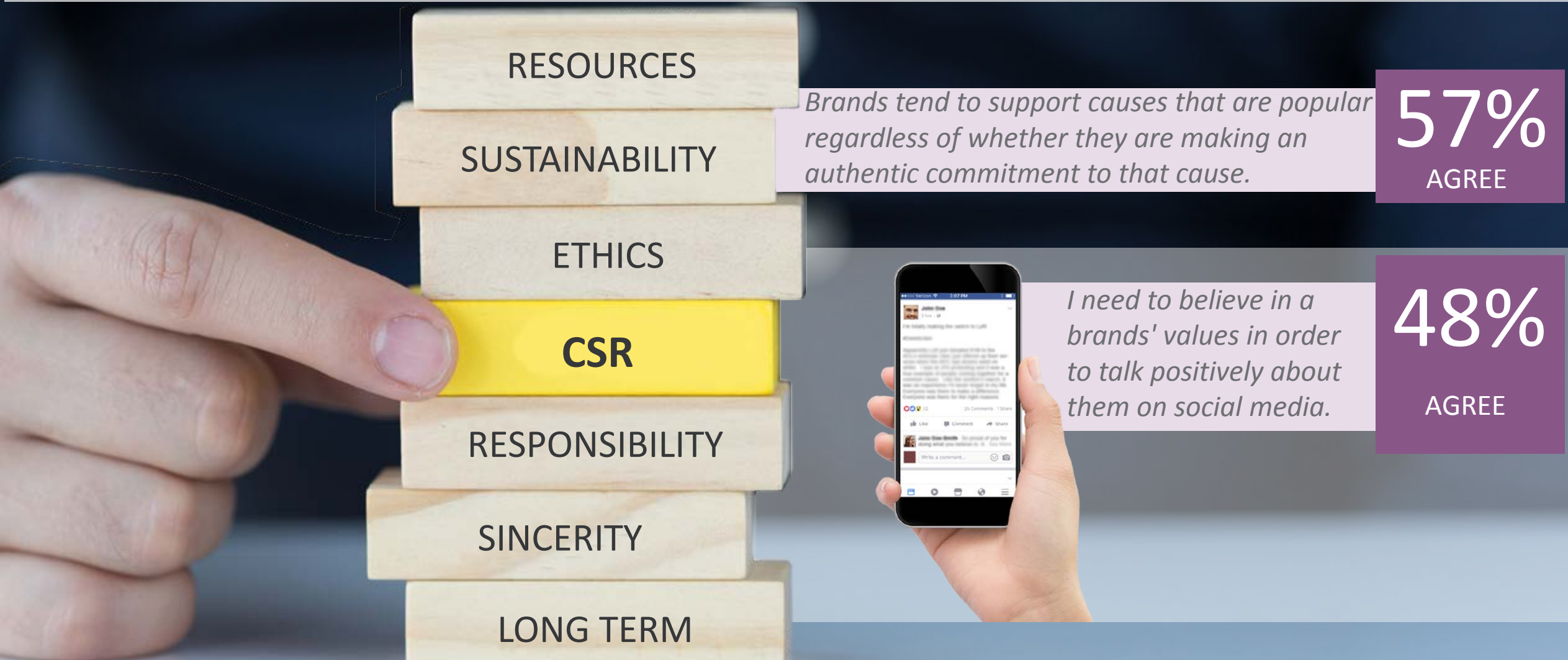
% S&P 500 PUBLISHING CSR REPORT



Source: Governance & Accountability Institute, Inc. Flash Report

<https://globenewswire.com/news-release/2016/03/15/819994/0/en/FLASH-REPORT-81-of-the-S-P-500-Index-Companies-Published-Corporate-Sustainability-Report-in-2015.html>

Authenticity and Value Alignment Matter



Source: YouGov Omnibus January 10-11, 2017 among 1,081 members of the U.S. General Population
To what extent do you agree with the following statements?

Brands tend to support causes that are popular regardless of whether they are making an authentic commitment to that cause.

I need to believe in a brands' values in order to talk positively about them on social media.

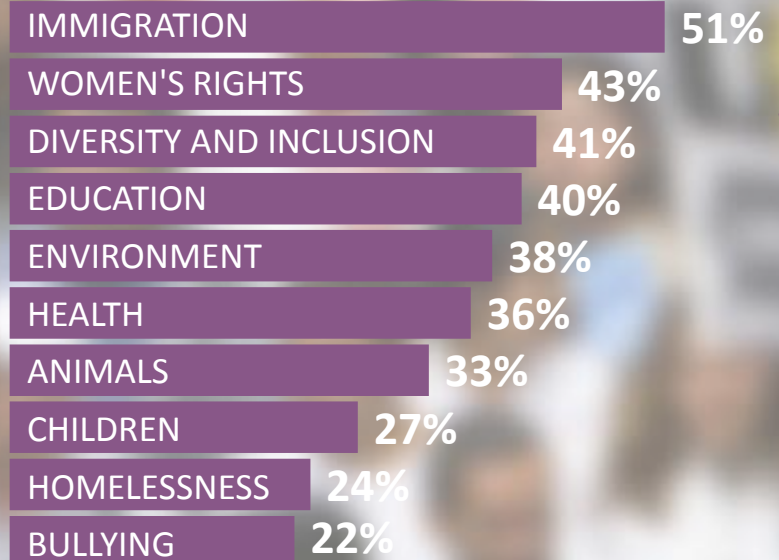
Current Climate Creating Strong Advocates for Variety of Causes

SUPPORT FOR CAUSE IN PAST 3 MONTHS

% Increased
Support for Cause

31%

SPECIFIC CAUSES SUPPORTED



Top 10 shown

Among those with increased
support for social causes



Source: YouGov Omnibus February 5 – 6, 2017 among 1,078 members of the U.S. General Population
Over the past 3 months, how has your level of support for social causes changed, if at all?

You mentioned you have increased your level of support for social causes over the past 3 months. Which causes in particular have received more of your support? (n=355)

Events & Messages Viewed Through Different Lens

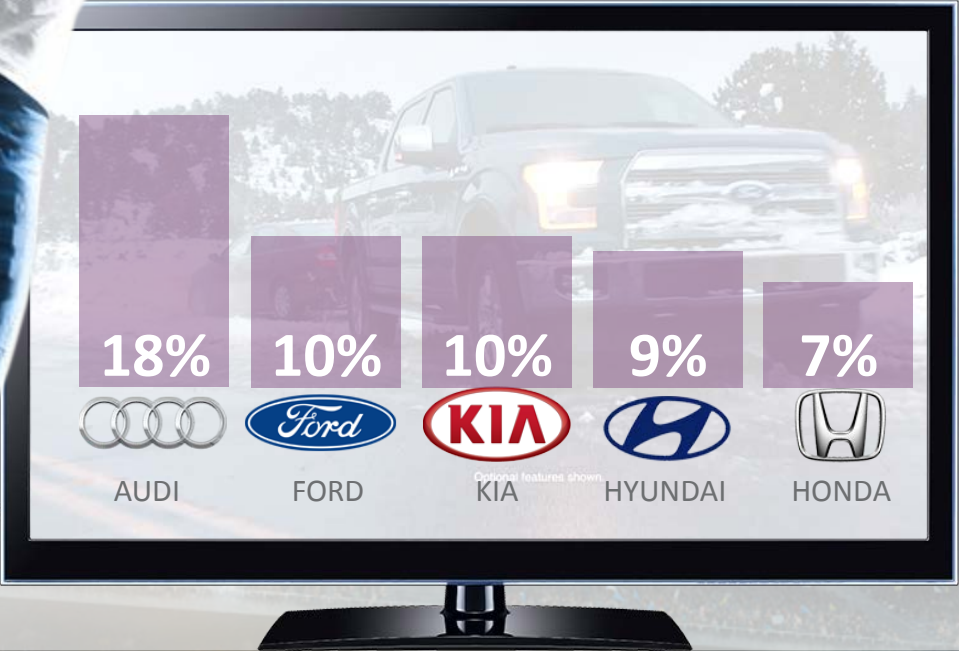


PRESENCE OF POLITICAL STATEMENT

LADY GAGA’S HALFTIME SHOW



AUTOMOTIVE SUPER BOWL ADS
% THINK HAD POLITICAL MESSAGE



63%
No,
I don't
think it had
a political
message

37%
Yes,
I think it
had a
political
message

**Among those who saw it
Source: YouGov Omnibus February 5 – 6, 2017 among 1078 members of the U.S. General Population
Did you think Lady Gaga's Super Bowl half-time show had a political message?
Of the automotive ads that aired during the Super Bowl, which of the following, if any, had a political statement?*

Is There New Risk In "Doing Good"?

IS DOING ENVIRONMENTAL GOOD STILL GOOD FOR BUSINESS?

NO

46%

YES

54%

42%



DEMOCRATS

58%

44%



REPUBLICANS

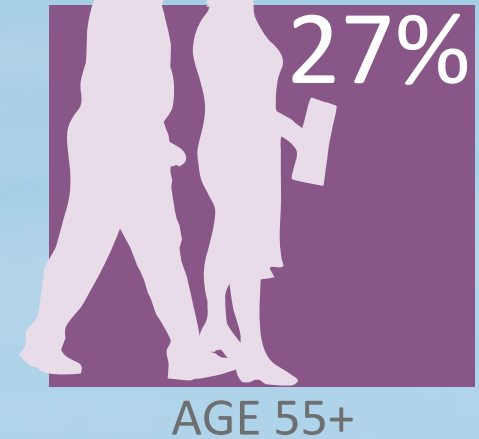
56%



Source: YouGov Omnibus February 5 – 6, 2017 among 1,078 members of the U.S. General Population
For the past several years, companies have come around to the idea that doing good toward the environment is good for business, is this still true in 2017?

Varying Generational Expectations for Brands

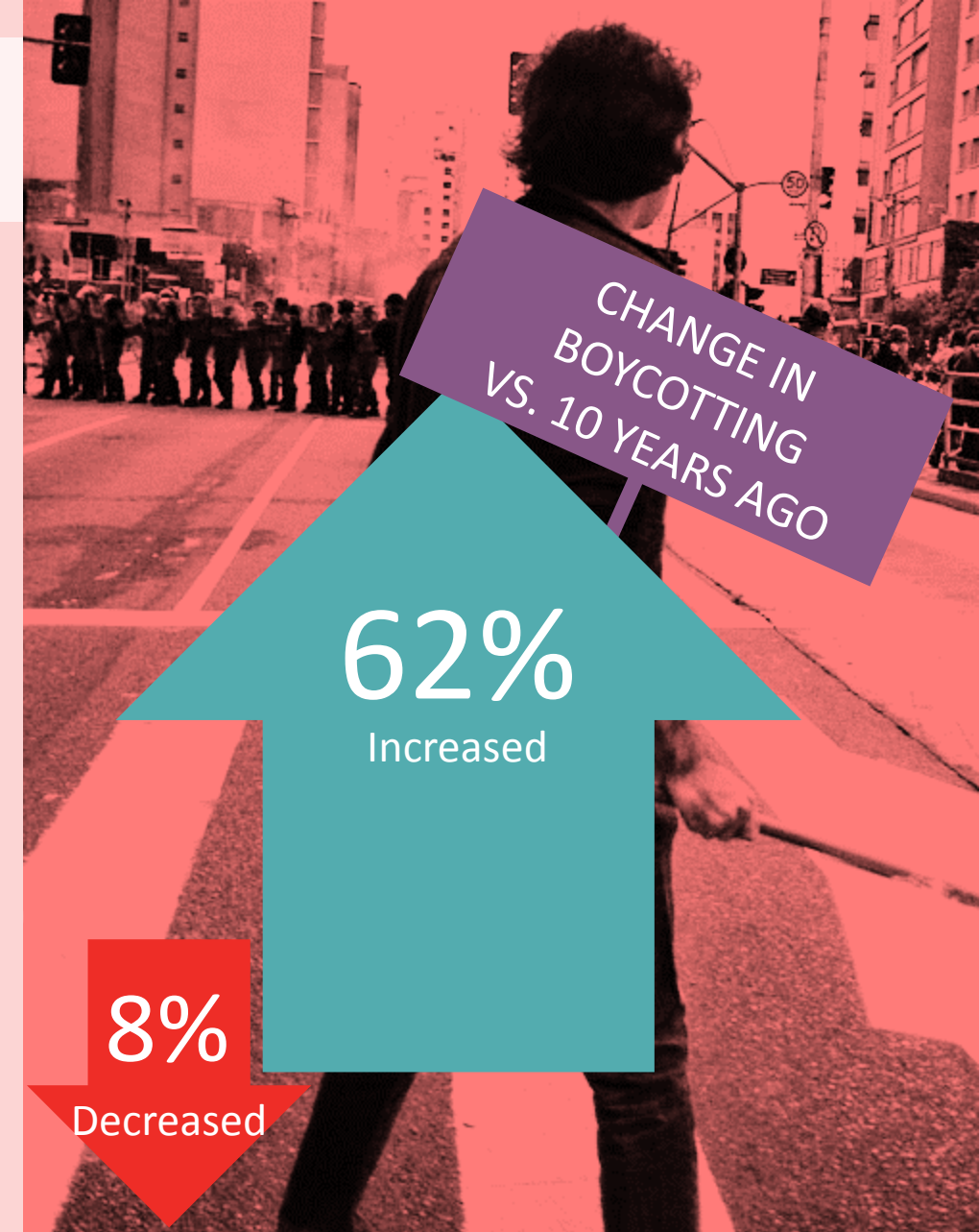
BRANDS TAKING A STAND ON SOCIAL ISSUES



Source: YouGov Omnibus January 6-9, 2017 among 1,153 members of the U.S. General Population
Thinking about when brands take a stand concerning issues in society...In general, which ONE of the following statements BEST describes your opinion?

Majority Willing to Boycott

And tendency toward this behavior is perceived to have increased over time



Source: YouGov Omnibus January 6-9, 2017 among 1,153 members of the U.S. General Population

Please imagine that a brand took a stand on an issue in society that you strongly disagreed with...How likely, if at all, would you be to boycott that brand's products/service? Thinking about how many people boycott brands due to stands on political issues now compared to 10 years ago...To what extent do you think the number of people doing this has increased or decreased, or has it stayed about the same?

Buying Decisions Based on Brand Values Alignment†

NOT PURCHASED BECAUSE DON'T BELIEVE IN WHAT COMPANY STANDS FOR



Source: YouGov Omnibus January 10-11, 2017 among 1,081 members of the U.S. General Population
Have you ever NOT bought something because you don't believe in what the company stands for?



T: 1-888-729-0773 E: research@yougov.com W: Research.YouGov.com

YouGov[®] What the world thinks